

Project Name: Centralized Revenue Opportunity System - CROS
OCIO Project #:
Department: Board of Equalization (BOE)
Revision Date:

Concept Statement

Description

Brief description of the proposed project:

BOE proposes, using a benefit based procurement approach, to replace and combine the functions of the Integrated Revenue Information System (IRIS) and Automated Collection Management System (ACMS), implement data warehouse/reporting capabilities and expand e-services to tax and fee payers. The proposed system will increase tax and fee revenues by improving data collection, access to data and sharing of data for improved business efficiencies.

Need Statement

High Level Functional Requirements:

The new system must contain the core BOE business functions used across multiple tax and fee programs supported by the current systems: account registration, return processing, cashiering, auditing, collection, and appeals. The new system must support internal users, tax and fee payers and other external users and be easier to use than the current systems. The new system will improve the analysis and validation of data and provide more timely and accurate data to staff and decision-makers.

What is Driving This Need?

BOE's existing systems are out dated, expensive to maintain and are not able to respond quickly to new or changing legislation. The lack of flexibility negatively impacts collection of tax and fee revenues. This project will increase business and IT process efficiencies and increase tax and fee revenues for the State.

Risk to the Organization if This Work is Not Done:

Potential new revenues and services would be lost if BOE's CROS project is not approved. Improving business program efficiencies, obtaining the most current technology and adding a data warehouse will lead to increased tax and fee revenue. The new system will provide a flexible infrastructure that allows the capability to easily add new taxes and fees to meet legislative mandates.

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Benefit Statement

Intangible Benefits

Process Improvements (describe the nature of the process improvement):

BOE expects this project to improve processes by improving workflows, enabling faster business rule changes, which will allow for more collaboration between program areas.

Other Intangible Benefits:

TBD

Tangible Benefits

Revenue Generation (describe how revenue will be generated):

It is anticipated the new system will provide new revenues of \$150 million from improved revenue collections, audit modeling, and compliance registrants. The project will analyze and estimate revenue potential as it moves forward, taking into consideration the solution proposed by the vendors.

Cost Savings (describe how cost will be reduced):

The project will analyze and estimate cost savings as the project moves forward taking into consideration the solution proposed by the vendors.

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Cost Avoidance

The project has the potential to avoid costs related to implementing piecemeal solutions. The project will analyze and estimate this cost avoidance as it proceeds based on the vendors proposed solution.


Risk Avoidance

TBD

Improved Services:

BOE expects this project to improve service to their tax and fee payers and other customers by providing additional on-line services and the ability to more easily access information associated with their individual business or businesses. It is anticipated the system will provide tax and fee payers self-managed account capabilities as well as improve and simplify the process for understanding, reporting, and paying taxes and fees.

Consistency

"No" Responses 		Rationale	Action Required
Enterprise Architecture		TBD	
Business Plan	Yes		
Strategic Plan	Yes		

Impact to Other Entities

Nature of Impact to Other Entities

Entity:
<i>Describe the nature of the impact:</i>
TBD

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Entity:

Describe the nature of the impact:

TBD

Entity:

Describe the nature of the impact:

TBD

Entity:

Describe the nature of the impact:

TBD

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Solution Alternatives

Alternative 1:

TBD

Technical Considerations for Alternative 1:

TBD

ROM Cost: to

Note: high end of range must not exceed 200% of low end of range

Alternative 2:

TBD

Technical Considerations for Alternative 2:

TBD

ROM Cost: to

Note: high end of range must not exceed 200% of low end of range

Alternative 3:

TBD

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Technical Considerations for Alternative 3:

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ROM Cost: to

Note: high end of range must not exceed 200% of low end of range

Recommendation

Comparison:

Alternative 1	ROM Cost	Risk
	\$0 - \$0	
Alternative 2	ROM Cost	Risk
	\$0 - \$0	
Alternative 3	ROM Cost	Risk
	\$0 - \$0	

Conclusions:

1	
2	
3	
4	

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Recommendation:

Project Approach *(if known)*

System Complexity:			System Business Hours: <i>(e.g., 24x7, 9am-5pm)</i> :		
Architecture	<input type="checkbox"/> Mainframe	<input type="checkbox"/> Client Server	<input type="checkbox"/> Web Based		Num. of New Databases:
Technology	<input type="checkbox"/> New	<input type="checkbox"/> New to Staff	<input type="checkbox"/> In-House Experience		Interfaces:
Implementation	<input type="checkbox"/> Central Site	<input type="checkbox"/> Phased Roll-out			Num. of Sites:
M & O Support	<input type="checkbox"/> Contractor <input type="checkbox"/> Data Center <input type="checkbox"/> Project <input type="checkbox"/> In House				
Procurement Approach: Benefit-based procurement approach					Number of Procurements:
Open Procurement?		Yes			
Delegated Procurement?					
Scope of Contract	<input type="checkbox"/> Development <input type="checkbox"/> Implementation <input type="checkbox"/> M & O <input checked="" type="checkbox"/> Other: TBD				
Anticipated Length of Contract:		Years / extensions for years			